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Applicant : Isaac J. William et al.
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Examiner : Almatrahi, Faris S.

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Interview Summary filed
Via Electronic Filing

INTERVIEW SUMMARY

Dear Examiner Almatrahi:

In response to the telephone interview conducted on **Tuesday, 9 June 2009**, please find a record of the interview below.

Identification of Claims and References Discussed

Claim discussed: Claim 1

References discussed: Maritzen (US 5,987,429); and Bross (US 2003/0105687).

Applicants' Arguments

In the embodiments of the present invention, a tax rules navigator gets a rule from a set of tax rules. The tax rule points to a configurable driver template, which points to a group of conditions. If all of the conditions are satisfied, the appropriate process result is retrieved. If one of the conditions are not satisfied, the next tax rule is examined. (See Instant Application at paragraphs [00123]-[00124]). By definition, a driver is an input that affects the outcome of one or more processes. A driver template is used to group two or more drivers that may

simultaneously affect the outcome of one or more processes. A tax rule specifies the driver template to use *for a specific process*. (See Instant Application at paragraphs [00115]-[00116] and [00119]). Accordingly, different tax rules specify different driver templates *for different processes*.

By contrast, in Bross, “[o]ne and the same filing service can be used for different jurisdictions, and *the processing steps to be performed* by the user are *the same for all jurisdictions*.” (See Bross, at paragraph [0141]). Therefore, Applicants respectfully submit that Bross fails to disclose the recited limitations of amended claim 1 that “responsive to tax rule not applying to the transaction and wherein additional tax rules exist, the method further comprises applying *a next tax rule which specifies a next configurable template for a next process* in the order of precedence.” This is because Bross uses the *same* process for all different jurisdictions.

Moreover, as Examiner correctly noted in paragraph 8 of the Office Action, Maritzen fails to disclose using configurable template. Thus, Maritzen cannot disclose applying a next tax rule which *specifies a next configurable template for a next process* in the order of precedence.

Proposed Amendment

1. (Currently amended) A method for determining taxes for a transaction by applying tax rules specified using configurable templates in a computer system, comprising:

receiving the transaction for which taxes are to be determined;

examining a configurable template associated with a tax rule,

~~wherein the configurable template identifies a set of attributes associated with the transaction,~~

wherein the tax rule specifies the configurable template to use for a specific process,

wherein the configurable template includes one or more drivers to facilitate ~~the~~ configuration and reusability of the configurable template in the tax rule ~~rules~~,

wherein ~~the drivers are the~~ each driver identifies a set of attributes associated with the transaction that act as an input to the specific process, and

wherein the tax rule is produced by the computer system ~~using the configurable template from by~~ interpreting abstracted tax authority rules;

examining a set of conditions for the set of attributes identified by the driver;

~~when~~ responsive to each condition in the set of conditions ~~[[is]]~~ being satisfied, using a process result ~~associated with the set of conditions in determining to determine~~ a tax for the transaction, wherein the process result indicates the outcome of ~~[[a]]~~ the specific process associated with the tax rule condition; and

~~wherein when the~~ responsive to tax rule ~~does not apply~~ applying to the transaction and wherein additional tax rules exist, the method further comprises applying ~~the~~ a next tax rule which specifies a next configurable template for a next process in the order of precedence ~~in the process of determining the transaction, wherein the additional tax rules are applied in a sequence determined by a precedence ordering of the additional tax rules.~~

Correction of Inventorship

Applicants also wish to discuss the petition for correction of inventorship filed on 14 January 2005 and request consideration of adding **Paulo Back** to the list of inventors.

Outcome of Interview

The Examiner suggested further clarify the arguments and incorporating limitations of dependent claim 2 to overcome potential obviousness rejection based on other related prior arts in the field.

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